



# **SANDATA ELECTRONIC VISIT VERIFICATION (EVV): EMPLOYEE DATA ENTRY**

# OBJECTIVES



After completing this lesson, you will be able to:

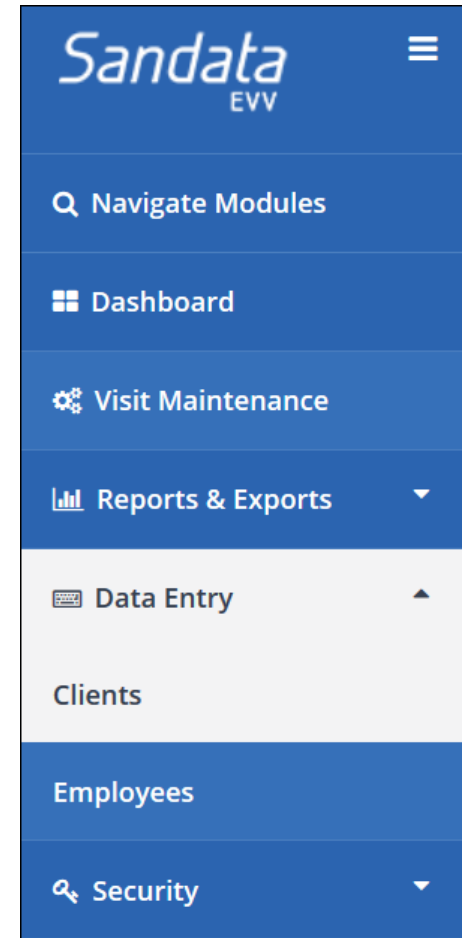
- ◆ Search for an employee
- ◆ Add an employee record
- ◆ Update an employee record
- ◆ Delete/close an employee record

# KEY TERMINOLOGY

Term/Acronym	Definition
<b>Client</b>	A person who receives services through the Medicaid program
<b>Employee</b>	A person who is employed by an agency provider to provide care to one or more clients

# ACCESSING DATA ENTRY

- ◆ The Data Entry module allows system users to maintain client and employee records.
- ◆ A system user with the appropriate permissions will see the Data Entry link listed in the Navigation panel on the left side of the screen.
- ◆ Clicking on the link will expand the section to show Client and Employee options.

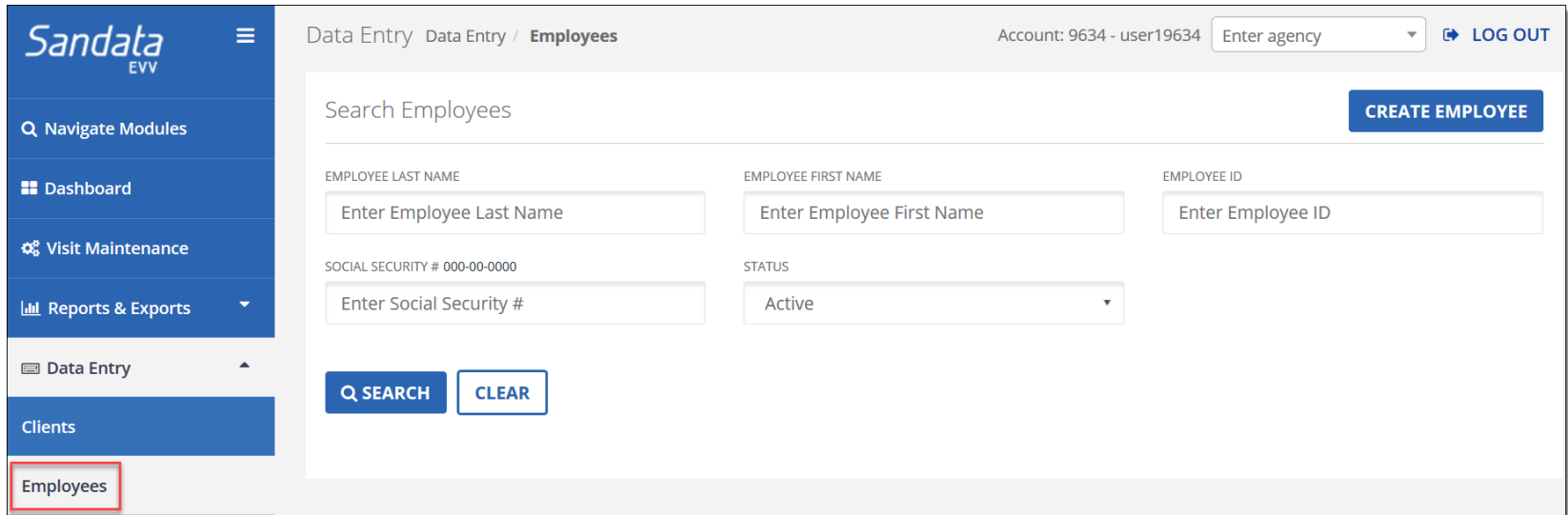




# **SEARCH FOR AN EMPLOYEE**

# SEARCH FOR AN EMPLOYEE

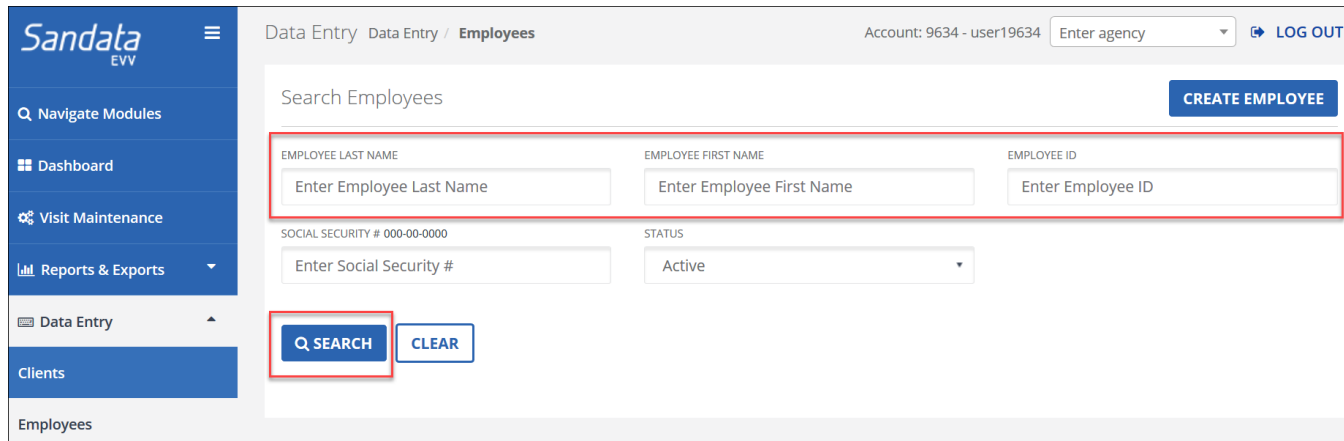
1. Click **Data Entry > Employees** from the Navigation panel. The *Data Entry / Employees* search screen displays.



The screenshot shows the Sandata EVV Data Entry / Employees search screen. The left navigation panel is blue and contains the following items: Sandata EVV, Navigate Modules, Dashboard, Visit Maintenance, Reports & Exports, Data Entry, Clients, and Employees (highlighted with a red box). The main content area is white and contains the following elements: A header bar with 'Data Entry Data Entry / Employees', 'Account: 9634 - user19634', 'Enter agency' dropdown, and 'LOG OUT' button. A 'Search Employees' section with a 'CREATE EMPLOYEE' button. Search fields for 'EMPLOYEE LAST NAME', 'EMPLOYEE FIRST NAME', 'EMPLOYEE ID', 'SOCIAL SECURITY # 000-00-0000', and 'STATUS' (with a dropdown menu showing 'Active'). A 'Q SEARCH' button and a 'CLEAR' button.

# SEARCH FOR AN EMPLOYEE

2. Enter values either in the **EMPLOYEE ID**, **EMPLOYEE FIRST NAME** or **EMPLOYEE LAST NAME** field, or a combination of the three (3).
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



The screenshot shows the Sandata EVV Data Entry / Employees page. The page has a blue sidebar with navigation links: Navigate Modules, Dashboard, Visit Maintenance, Reports & Exports, Data Entry, Clients, and Employees. The main content area is titled 'Data Entry / Employees' and shows a search form. The search form has a 'Search Employees' header and a 'CREATE EMPLOYEE' button. Below the header are three input fields: 'EMPLOYEE LAST NAME' (with placeholder 'Enter Employee Last Name'), 'EMPLOYEE FIRST NAME' (with placeholder 'Enter Employee First Name'), and 'EMPLOYEE ID' (with placeholder 'Enter Employee ID'). Below these are two more input fields: 'SOCIAL SECURITY # 000-00-0000' (with placeholder 'Enter Social Security #') and 'STATUS' (with a dropdown menu showing 'Active'). At the bottom of the search form are two buttons: 'Q SEARCH' and 'CLEAR'. A red box highlights the three top input fields, and another red box highlights the 'Q SEARCH' button.



If multiple search values are entered, Sandata EVV attempts to match against all exact values entered. Searching with no criteria selected displays a complete list of all active clients.

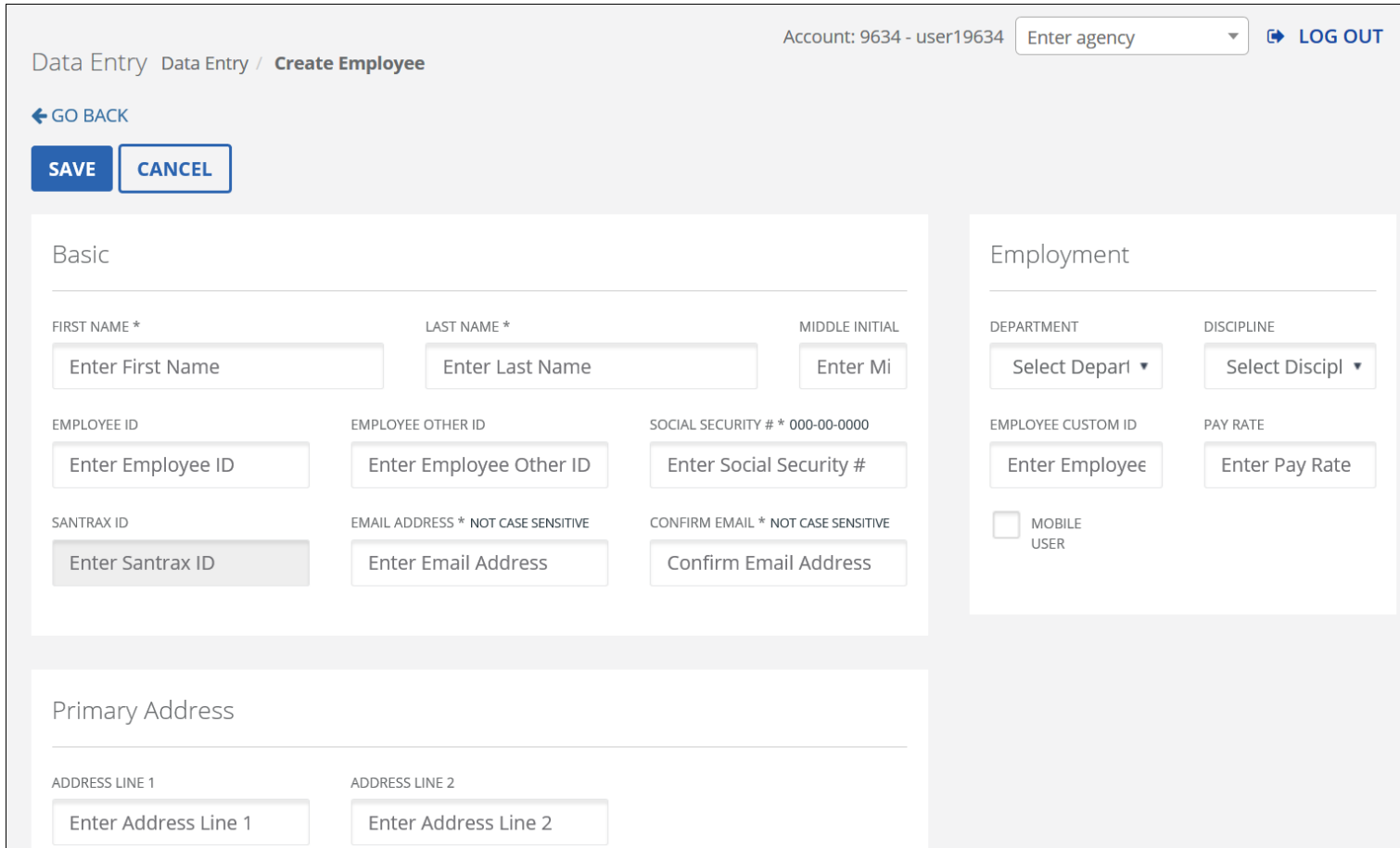


# **CREATE NEW EMPLOYEE(S)**



# CREATE NEW EMPLOYEE(S)

1. Click **CREATE EMPLOYEE**. The *Create Employee* screen opens.



The screenshot displays the 'Create Employee' web form. At the top, the breadcrumb 'Data Entry / Create Employee' is visible, along with the user account '9634 - user19634', an agency selection dropdown, and a 'LOG OUT' link. Below the breadcrumb are 'GO BACK', 'SAVE', and 'CANCEL' buttons. The form is divided into three main sections: 'Basic', 'Employment', and 'Primary Address'. The 'Basic' section contains fields for First Name, Last Name, Middle Initial, Employee ID, Employee Other ID, Social Security #, Santrax ID, Email Address, and Confirm Email. The 'Employment' section includes Department and Discipline dropdowns, Employee Custom ID, Pay Rate, and a checkbox for 'MOBILE USER'. The 'Primary Address' section has fields for Address Line 1 and Address Line 2.

Data Entry / Data Entry / **Create Employee**

Account: 9634 - user19634 Enter agency LOG OUT

← GO BACK

**SAVE** **CANCEL**

**Basic**

FIRST NAME \* LAST NAME \* MIDDLE INITIAL

Enter First Name Enter Last Name Enter Mi

EMPLOYEE ID EMPLOYEE OTHER ID SOCIAL SECURITY # \* 000-00-0000

Enter Employee ID Enter Employee Other ID Enter Social Security #

SANTRAX ID EMAIL ADDRESS \* NOT CASE SENSITIVE CONFIRM EMAIL \* NOT CASE SENSITIVE

Enter Santrax ID Enter Email Address Confirm Email Address

**Employment**

DEPARTMENT DISCIPLINE

Select Depart Select Discipl

EMPLOYEE CUSTOM ID PAY RATE

Enter Employee Enter Pay Rate

☐ MOBILE USER

**Primary Address**

ADDRESS LINE 1 ADDRESS LINE 2

Enter Address Line 1 Enter Address Line 2

# CREATE NEW EMPLOYEE(S)

2. Enter **FIRST NAME**, **LAST NAME**, **SOCIAL SECURITY #** and **EMAIL ADDRESS** (Required).

Basic

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FIRST NAME *	LAST NAME *	MIDDLE INITIAL
<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter Mi"/>
EMPLOYEE ID	EMPLOYEE OTHER ID	SOCIAL SECURITY # * 000-00-0000
<input type="text" value="Enter Employee ID"/>	<input type="text" value="Enter Employee Other ID"/>	<input type="text" value="Enter Social Security #"/>
SANTRAX ID	EMAIL ADDRESS * NOT CASE SENSITIVE	CONFIRM EMAIL * NOT CASE SENSITIVE
<input type="text" value="Enter Santrax ID"/>	<input type="text" value="Enter Email Address"/>	<input type="text" value="Confirm Email Address"/>



The Santrax ID is automatically created by the system upon saving the employee record. The SANTRAX ID is entered by the employee as their unique ID for EVV Telephony calls.

# CREATE NEW EMPLOYEE(S)

## 3. Enter employee's Primary Address (Optional).

Primary Address

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ADDRESS LINE 1

Enter Address Line 1

ADDRESS LINE 2

Enter Address Line 2

CITY

Enter City

STATE

Select ▼

ZIP CODE 00000-0000

Enter Zip Code

# CREATE NEW EMPLOYEE(S)

4. Enter employee's **PHONE NUMBER** (Optional).

Phone Number

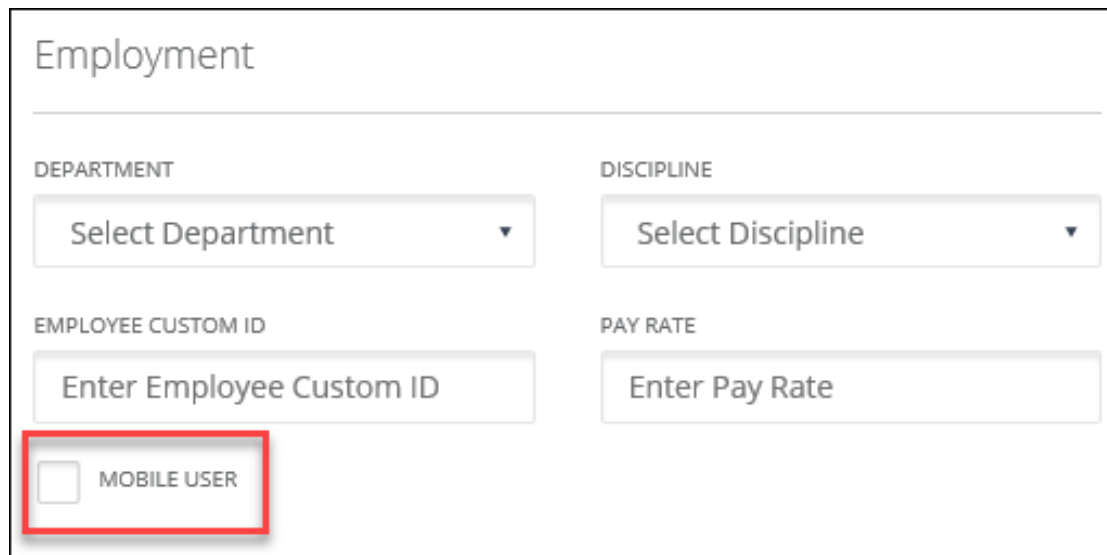
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PHONE NUMBER (000) 000-0000

Enter Phone Number

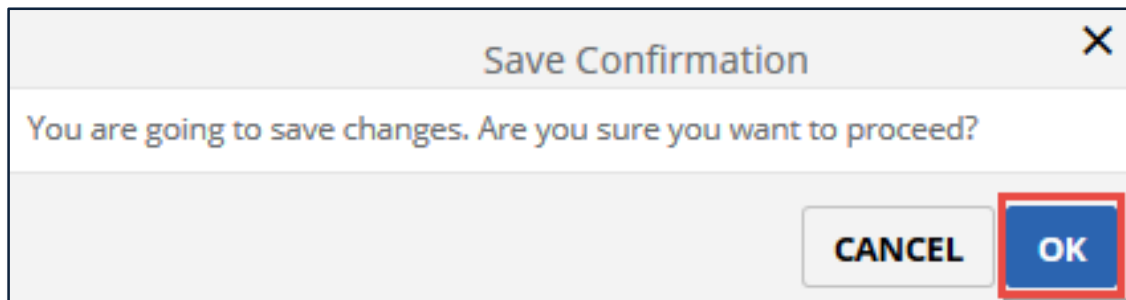
## CREATE NEW EMPLOYEE(S)

5. Enter the Employment information. The **MOBILE USER** checkbox must be checked in order for the system to create a temporary password for the employee to use the device to call-in/call-out.

A screenshot of a web form titled 'Employment'. The form contains four input fields: 'DEPARTMENT' (a dropdown menu with 'Select Department' text), 'DISCIPLINE' (a dropdown menu with 'Select Discipline' text), 'EMPLOYEE CUSTOM ID' (a text input field with 'Enter Employee Custom ID' text), and 'PAY RATE' (a text input field with 'Enter Pay Rate' text). Below these fields is a checkbox labeled 'MOBILE USER', which is highlighted with a red rectangular border. The form is enclosed in a light gray border with a shadow effect.

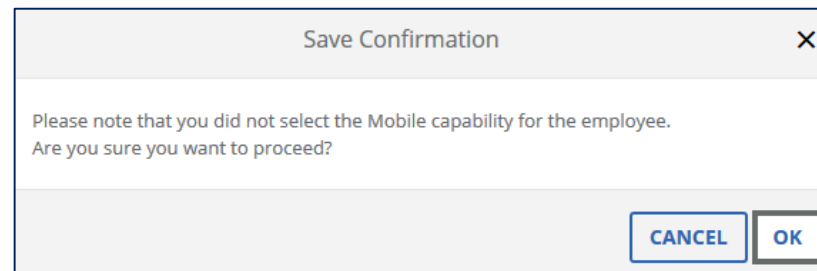
# CREATE NEW EMPLOYEE(S)

6. Click **SAVE**. The Save Confirmation dialog box displays.
7. Click **OK**.



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If the MOBILE USER checkbox is not selected, Sandata EVV displays a reminder.






# **MODIFY/DELETE/REACTIVATE EMPLOYEE**

# MODIFYING EMPLOYEE DATA


- ◆ Modifying a client's data allows updates to the information, as necessary.

Last Name	First Name	Employee ID	Social Security #	Status	Actions
				Active	



# DELETING EMPLOYEES


- ◆ Terminating an employee makes the record inactive. Employees cannot be terminated with a future date.
- ◆ Any activity already captured will continue to reference the employee's previous information. Once an employee is terminated, no activity will be allowed on that employee record, including call-in and call-outs or employee record modifications.

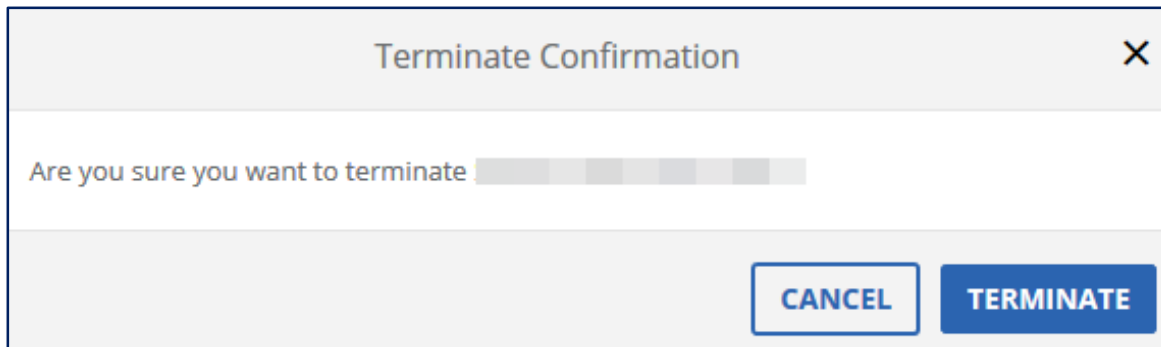
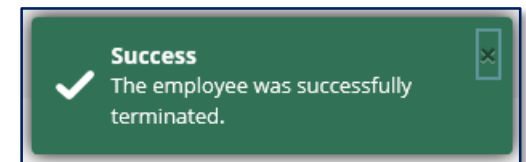
Last Name	First Name	Employee ID	Social Security #	Status	Actions
Acosta	John		***-**-8066	Active	 



Terminating an employee is not retroactive.

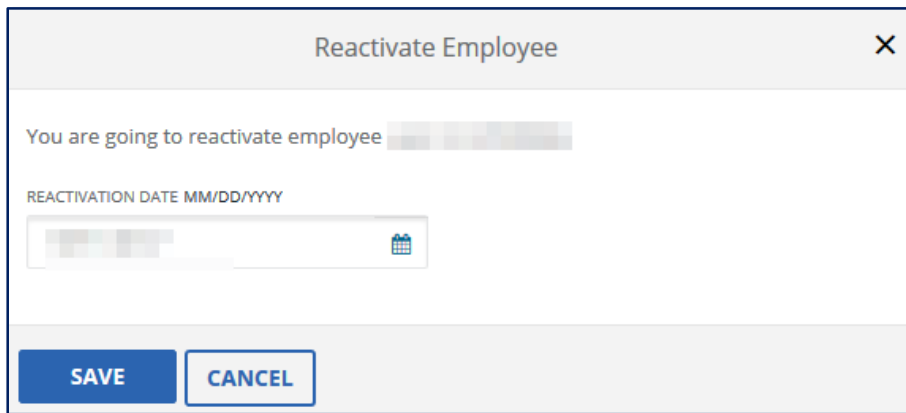
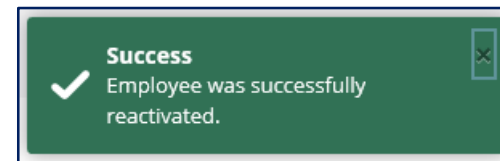
# DELETING EMPLOYEES

1. Search for the employee.
2. Click Terminate (  ) to the right of the selected employees name. The Terminate Confirmation dialog box displays
3. Click TERMINATE. A successful confirmation displays.

A screenshot of a 'Terminate Confirmation' dialog box. The title bar is light gray with the text 'Terminate Confirmation' and a close button (X). The main area is white and contains the text 'Are you sure you want to terminate' followed by a series of gray squares. At the bottom, there are two buttons: 'CANCEL' and 'TERMINATE'.

# REACTIVATING EMPLOYEES

1. Search for a client with the status of Inactive.
2. Click Reactivate to the right of the selected client's name. The Reactivate Client confirmation dialog box displays.
3. Select a **REACTIVATE DATE**. The date defaults to the current day's date. A client can be reactivated up to the date they were originally deleted.
4. Click **SAVE**. A successful confirmation dialog box displays.

A screenshot of a 'Reactivate Employee' dialog box. The title bar says 'Reactivate Employee' with a close button (X). The main content area says 'You are going to reactivate employee' followed by a blurred name. Below that, it says 'REACTIVATION DATE MM/DD/YYYY' and shows a date field with a blurred date and a calendar icon. At the bottom, there are two buttons: 'SAVE' and 'CANCEL'.

# QUESTIONS...

